



University Budget Office TM1 Training Information

It is that time again...

FY20 TM1 Budget Season

...has begun

Key Dates to Know:

Thursday, March 21, 2019: TM1 Personnel salary update

(Note: TM1 will be down 3/21-3/25)

Thursday, April 25, 2019: TM1 Personnel Data freeze

(Note: TM1 will be down 4/25)

Wednesday, May 15, 2019 (11:59PM): Budgets in TM1 Finalized

Training Location: MCB-326 Mt. Jefferson

Day	Date	Time	Topic
Friday	April 5, 2019	2-4pm	TM1 Basics
Friday	April 19, 2019	2-4pm	TM1 Advanced
Friday	April 26, 2019	2-4pm	TM1 Deep Dive Series: Personnel
Friday	May 3, 2019	2-4pm	TM1 Open Lab
Friday	May 10, 2019	2-4pm	TM1 Open Lab
Friday	May 17, 2019	10am-4pm	TM1 Revision Lab

The University Budget Team (UBT) will provide further guidance via the UBT Memo on Budget Development and Base Budgets later in the spring.

TM1 Training Descriptions

Please sign up for sessions on our website at: www.pdx.edu/budget

TM1: Basics

A 1.5 hour introductory training to inputting budgets in TM1.

Training Objectives:

- Getting to TM1
- TM1 Resources
- TM1 Introduction

Who Should Attend: This session is designed for users unfamiliar with the TM1 system. Users unfamiliar with TM1 or new to TM1 will benefit from this training session.

TM1: Advanced

This one hour training session is meant for users comfortable with input in TM1. It will quickly reintroduce TM1, explore different views in TM1 and various quick entry methods.

Training Objectives:

- Getting to TM1
- TM1 Resources
- Summary Tab Analysis
- TM1 Views
- Quick Entry Methods
- Leveraging Subsets

Who Should Attend: This session is designed for users familiar with the TM1 system and want to leverage TM1 for more reporting and analysis.

TM1 Deep Dive Series: Personnel

This one hour deep dive session will dig into the nuances in the Personnel tab.

Training Objectives:

- Unclassified Personnel
- Classified Personnel
- Other Pay
- Retirement & OPE
- Personnel warnings

Who Should Attend: This session is designed for users with familiarity with the TM1 system. Users seeking a deeper understanding of the workflow in the personnel tab will benefit from this training session.

As a reminder, the budget office has switched to a team-based approach for serving our campus stakeholders via a centralized inbox to address inquiries. Please send any questions or concerns to: budget@pdx.edu